

# Key Points

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## SOLDIERS, SAILORS, AND MARINES FUND

- The Soldiers, Sailors, and Marines Fund (SSMF) involves a partnership between state entities and a private organization (i.e., the American Legion), and the same name is used in four different ways. It is:
  - a pool of money financed by the state and held in trust by the state treasurer;
  - an appropriated fund in the state budget that sets annual expenditure levels;
  - a state agency that administers an assistance program; and
  - a temporary assistance program for war veterans.
- The principal in the SSMF trust fund is currently worth approximately \$59 million and produces annual income of about \$3 million.
- The legislature establishes the amount of money in the SSMF appropriated fund based on estimated revenue expected from the trust fund. Allocations during the fiscal year are based on the appropriated fund rather than trust fund revenue. The total appropriation for FY 05 was \$3.6 million, including:
  - \$1.3 million for SSMF agency personnel and other operating expenses;
  - \$1.8 million for assistance awards;
  - \$252,000 to the Department of Veterans' Affairs for headstones; and
  - \$310,000 to the Military Department for honor guards at funerals.
- Day-to-day operation of the SSMF assistance program is handled by 13 state employees who work for the agency known as the Soldiers, Sailors, and Marines Fund. This staff is responsible for informing the public about the existence of the program, processing applications for assistance, and distributing awards. (Approximately 100 volunteers supplement the work of the paid field investigators.)
- Employees of the SSMF agency receive the same fringe benefits as other state employees, but the cost of those benefits is paid out of the SSMF appropriated fund rather than a General Fund account as is the case for most other state employees.
- Because the treasurer of the American Legion Department of Connecticut is statutorily responsible for disbursing the income from the SSMF trust fund, a special requirement in the job description of the SSMF administrator is that he or she be the treasurer of the American Legion Department of Connecticut. Likewise, the assistant administrator must be the assistant treasurer of the American Legion Department of Connecticut.

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- The SSMF program offers a number of different forms of assistance, including vouchers for food and clothing, payment of medical and dental bills, weekly cash assistance, and payment of utility bills and funeral expenses.
- In order to be considered for assistance from the SSMF program, a person must meet criteria regarding military service and need. Allowable dates of war-time service are specified in statute, but need is not defined in statute, regulation, or bylaw.
- The SSMF program staff use a hands-on approach to process applications for assistance and deal with each person requesting aid on an individualized basis. The one-on-one approach begins during the initial application phase when an SSMF veterans' aid investigator or volunteer meets with the applicant to help him or her fill out the appropriate application form and gather needed documentation.
- The SSMF administrator and assistant administrator make all decisions about the amount and type of assistance an applicant will receive. They do not meet with individual applicants.
- In determining need, the SSMF program administrator and assistant administrator use economic criteria similar to those used by other government assistance programs, but they do not strictly enforce the standards and make exceptions if they believe circumstances warrant the provision of aid.
- The extent to which income and asset information is scrutinized depends on the amount and type of assistance requested. A request for multiple weeks of cash assistance or the payment of large medical bills will result in a more detailed financial review than a one-time request for a clothing voucher.
- Applicants do not necessarily receive all (or any) of the assistance they request. Depending on the type of help sought, the cost of that assistance, and the resources of the applicant, a person may be offered something different from what he or she requested.
- Anyone turned down completely for assistance can appeal the decision, but only one formal appeal hearing has been held since 2002.
- The SSMF agency reports annual application totals for FY 00 through FY 04 ranged from 2,509 to 2,835. However, a program review committee staff analysis of information for the same years found less than 2,000 unique identification numbers connected to the assistance provided each year.
- The amount of assistance given to individual recipients varies widely. During each of the last six fiscal years, the amounts per person ranged from less than \$10 to more than \$12,000.